



Hocking Valley Financial Solutions
Infinex Investments Inc.
Kenna M Miller
Senior Financial Advisor
Located at: Hocking Valley Bank
7 W. Stimson Ave.
Athens, OH 45701
740.594.0487
kmliller@infinexgroup.com
www.hockingvalleyfinancial.com



Answering the Financial Questions that Count

The topics listed below are intended to cover a variety of situations--more than any one household will ever likely need to consider. All of the information available is offered to help you understand your current financial situation and make informed decisions. Simply fill out the form (online or on paper) and return it to request information on the subjects that interest you.

Send information on checked items to:

Name _____

E-mail _____

Address _____

City _____

State _____ ZIP Code _____

Business phone _____

Home phone _____

Best time to call _____

Business Planning

- Starting or Buying a Business
- Choosing a Business Entity
- Business Insurance
- Business Tax Planning
- Retirement Plan Options
- Business Succession

Personal Finance

- Budgeting and Cash Reserves
- Establishing or Maintaining Credit
- Credit Cards
- Homeownership
- Buying or Leasing a Car
- Identity Theft

Education Planning

- Saving for College
- 529 Plans
- Financial Aid
- Student Loans
- Repaying Student Loans
- Education Tax Credits and Deductions

Insurance Planning

- Protecting Your Loved Ones with Life Insurance
- Estimating Your Life Insurance Needs
- What Type of Life Insurance Is Best for You?
- Creating an Estate Plan with Life Insurance
- Long-Term Care Options
- Financial Impact of a Disability

Estate Planning

- Wills and Trusts
- Planning for Incapacity
- Creating and Preserving a Family Legacy
- Using Life Insurance in Estate Planning
- Strategies to Minimize Estate Taxes
- Charitable Gifting Strategies

Retirement Planning

- IRAs
- Employer-Sponsored Retirement Plans
- Annuities
- Strategies for Retirement Plan Distributions
- Saving for Retirement
- Planning for Income in Retirement

Social Security and Medicare

- Understanding Social Security
- Social Security Retirement Benefits
- Social Security Disability Benefits
- Medicare
- Medicare Prescription Drug Coverage

Tax Planning

- Income Tax Planning
- Year-End Tax Planning
- Investment Tax Planning
- Alternative Minimum Tax (AMT)
- Gift and Estate Taxes

Other

If you want information about something not listed here, tell us below what you are looking for.

Investment Planning

- Investing Basics
- Setting Investment Goals
- Designing and Managing an Investment Portfolio
- Handling Market Volatility
- Asset Allocation and Diversification
- Taxable vs. Tax-Free Investing
- Stocks
- Bonds
- CDs
- Mutual Funds/ETFs
- Separately Managed Accounts

Life Events

- Buying a Home
- Getting Married
- Raising a Family
- Child with Special Needs
- Changing Jobs
- Starting a Business
- Caring for an Aging Parent
- Getting Divorced
- Death of a Family Member

Disclosure Information -- Important -- Please Review

Investment and insurance products and services are offered through INFINEX INVESTMENTS, INC. Member FINRA/SIPC. Infinex and the bank are not affiliated. Products and services made available through Infinex are not insured by the FDIC or any other agency of the United States and are not deposits or obligations of nor guaranteed or insured by any bank or bank affiliate. These products are subject to investment risk, including the possible loss of value. NOT FDIC-INSURED. NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY. NOT GUARANTEED BY THE BANK. MAY GO DOWN IN VALUE.